

A Luncheon Program Providing 1 Hour MCLE Credit

## Asset Protection Strategies for Real Estate Investors—Beyond LLCs

### Program Description

This program explores methods of owning real estate without exposing the owners and investors to personal liability arising from the property, and protecting the real estate from the creditors of the owners. Including a discussion of beneficiary trusts, Series LLCs, life insurance premium financing, captive insurance companies, and other unique legal and financial strategies for approaching real estate investments.

Date: Tuesday, October 26, 2004

Time: Check-in/lunch\* at 12:00 noon. Program to begin promptly at 12:30 pm

and to end by 1:30 pm

Place: State Bar of California, 4th Floor Conference Room A-B-C

180 Howard Street (between Spear & Main Streets), San Francisco

[2 blocks south of Embarcadero MUNI/BART Station]

Price: \$30 for members of the Real Property Law Section; \$40 for non-members

\*Registration fee includes a deli-style lunch

#### **SPEAKER:**

Jay D. Adkisson Director of Private Client Services

Select Portfolio Management, Inc.

#### **BIOGRAPHY:**

Jay D. Adkisson is one of today's foremost authorities on contemporary asset protection. Founder of the internationally famous website Quatloos.com, which receives tens of thousands of hits each day, Adkisson has appeared as an expert witness to the U.S. Senate Finance Committee and has been quoted in the Wall Street Journal, Forbes, and other influential publications.

Deadline ~ Your form and check payable to the State Bar of California, or credit card information must be received by Wednesday, October 20, 2004

#### MAIL TO

Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105-1639

#### FAX TO

Program Registrations at (415) 538-2368. Credit card information is mandatory.

#### **ON-SITE REGISTRATIONS**

On-site registrations will be on a space-available basis only. **Seating is limited—please register early!** 

#### FOR MORE INFORMATION

(415) 538-2564

 $The \ Office \ of \ Section \ Education \ \& \ Meeting \ Services \ is \ a \ certified \ State \ Bar \ of \ California \ MCLE \ provider.$ 

PROGRAM REGISTRATION FORM Note: One registrant per form. Photocopies may be used.	
Name:	Bar No
Firm:	
Address:	City & Zip Code:
Phone: () Fax: ()	Email:
Program Registration Fee (includes lunch):  \$30.00 Real Property Law Section Member \$40.00 Non-Section Member  Credit Card Information (VISA/MasterCard Only): I/we authorize the State Bar of California to charge my/our program registration to my/our VISA/MasterCard account. (No other credit cards will be accepted.)	
Account No	Expiration Date:
Cardholder's Name:	Signature:

#### **State Bar Education Foundation**

Real Property Law Section 180 Howard Street San Francisco, CA 94105-1639 First-Class Prsrt U.S. Postage PAID Documation

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Noon – 1:30 pm State Bar of California 4th Floor Conference Rooms A-B-C 180 Howard Street • San Francisco